Alma Essentials – Resources: Sets and Jobs  
Change Physical Items

Hello, in other training sessions, you learned how to create sets of records in Alma, and how to use jobs to apply changes to all members of those sets.

In this session, you will create a Set of items and then use a Job to move those resources to a temporary location for a special display.

First, you need to create the Set of items that will be moved. Go to Admin > Manage Sets.

On the Manage Sets page, click Create Itemized Set. In the Itemized Set Details pop-up give the set a Name and select any other Set parameters. For this example, you’ll select the Set content type as Physical items, and make sure it is Private is unchecked. Then click Create.

A Repository Search page will open for you to search for members. In the search bar set the field to search to Creator. Enter the creator’s name and click Search. As you find items, select the check boxes and click Add selected. When you have added all the items you want to move, click Done. This will take you back to the Manage Sets page.

You can see the list of current members by clicking Content. If you need to add more members, click the row action menu, and select Add Members to Set.

Now you need to set up the job to move the items to the special display location. You’ll go to Admin > Run a Job.

This opens the list of Jobs that can be run. Locate the Change Physical items information Job by either scrolling through the list or using the search box. Select the Job and click Next.

Find the Set of items you just created. Notice that the only Sets listed here are those with a Content Type of Physical items or Physical titles, because the Change physical items Job can only work on those content types. So, if you don't see the Set you created, it's possible the Content Type was incorrectly defined, and you'll need recreate the Set.

Click Next.

An informational notification will appear noting how many members will be updated with this Job. Now you’ll enter the Task Parameters. If you're not sure what a particular parameter is for, open the Help menu and select Help For This Page. This will open the documentation that has definitions for each of the parameters.

Parameters are organized into groups. For this example, scroll down to the Change temporary location information group.

To change a parameter, click the check box, then make the change. You’ll set the item temporary indication to: Yes, so anyone can search for items that are at a temporary location. Later, when you move these items back to their permanent location, you can use these parameters to clear the temporary information.

Then check the box for Temporary Location and select the location of the special display. In the Conditions drop-down menu, Unconditionally, means all items in the Set will get this new location. However, if you only want to move items that are not already at a temporary location, choose If field empty.

Please note, when you move an item to a temporary location, a holdings record is created for the new location, and it will have an icon indicating that it is temporary.

If your institution assigns temporary call numbers for items in a temporary location, make selections on these parameters. If the items will all leave this temporary location on a particular date and return to their permanent locations, choose a Due back date. When that date arrives, Alma will automatically run a Job to restore those items to their permanent locations.

Lastly, you can choose a Temporary item policy. For example, while these books are on display in the temporary location, you may want the items to have a shorter loan period. Or you could choose to make them Not for Loan while they are on display.

In addition to parameters for changing the temporary location, this Job also allows you to change other parameters for physical items.

The first group is for changing permanent location information. In addition to changing the Permanent location itself, you can change the call number and Storage location ID. Note, when you change the permanent location of an item, a new holdings record is created for the new location. If there are no more items in the old holdings record it will be deleted, which can affect any attached PO Lines. Please see the documentation for more information on this.

After the Temporary location information group, are parameters to Change general information about the items in the Set. Such as changing the Material type, the permanent Item policy, dates, Physical condition, and so on.

Farther down the page are parameters to Change inventory information, including the Weeding date.

Next is group of parameters that allow you to change the text in the various Notes fields on the items in the Set. Depending on your institution's policies, you may have particular uses for these Notes. Keep in mind, any note you add to a field here will completely delete and replace the current text in that field, unless you choose the Condition - If field empty, to only add the note if there is nothing already in the field. Or Append to field, to add it to the end of any existing text.

Lastly, you can Change retention information to prevent items from being withdrawn.

When you done applying your parameters, click Next. Review your selections for the Job and click Submit. Confirm that you want to run the Job on the selected members.

The Monitor Jobs page will open, and you can see the Job Status. Once it’s finished, it will be listed on the History tab.

You now know how to change information about physical items using Sets and Jobs in Alma.

Thanks for watching!